Chapter 19: The Contact List

SEER*DMS maintains system IDs, contact information, and professional affiliations for physicians, representatives of collaborative organizations, and other individuals. These data are used to support numerous tasks and processes; therefore, the maintenance of a current and complete Contact List is essential. The data in the Contact List are used by SEER*DMS to code physician data fields on incoming records. The reporting engine uses contact IDs to identify physicians for follow-back letters, follow-up letters, and reports. Users access the Contact List throughout SEER*DMS to set physician information in data fields and associate organization representatives with data sets or queries. For example, contacts are used to assign a follow-up physician or surgeon during visual editing, to set the data source for an import, and to send queries to organization representatives during follow-back.

There are three active system permissions which control access to the Contact List: *contact_add* (create a new contact), *contact_edit* (modify existing contacts), and *contact_view* (read only access to Contact List data). Contacts cannot be deleted in the current version of SEER*DMS. The *contact_delete* system permission was created to allow for this functionality in future versions.

In this chapter, you'll learn about

- Medical Practitioner and Organization Representatives
- Searching the Contact List
- Using the Medical Practitioner Lookup
- Adding or Modifying a Contact
- Deactivating or Reactivating a Contact
- Deleting a Contact

Medical Practitioner and Organization Representatives

SEER*DMS enables you to designate a contact as a "Medical Practitioner" and/or an "Organization Representative". The Medical Practitioner and Organization Representative designations must be properly maintained to ensure that current data are available in lookups used throughout SEER*DMS.

- **Medical Practitioner** – Contacts with this designation are available in the Medical Practitioners lookup that is used to select a physician while editing a record or patient set. You must designate the contact as a Medical Practitioner in order to use the lookup to find and enter the ID into a physician or surgeon data field.
- **Organization Representative** - Any contact with one or more organizational affiliations is considered to be an "Organization Representative." An individual may be a representative for more than one organization or facility. Similarly, an organization or facility may have multiple representatives. In some cases, SEER*DMS will prompt for an Organization Representative. For example, you are asked to specify an Organization Representative as the data source of an import. When you select a person from the Organization Representative Lookup, you must select the entry that is associated with the appropriate organization. A person who is affiliated with multiple facilities will have multiple entries in the lookup; John Smith may be listed at both Memorial Hospital and Mercy Hospital.

Searching the Contact List

Requires system permission: *contact_view*

To search or view the Contact List:

1. Select **View** > **Contacts**. All active contacts will be listed in alphabetical order by last name.
2. To sort the list by the data in another column, click one of the underlined column headers (you cannot sort by address). To reverse the sort order, click the same header again.

   Tip: In SEER*DMS, the sort order of a table is indicated by the column headers. A unique color is used for the sort field's column header. An up arrow will be displayed next to the column name if the table is sorted in ascending order; a down arrow will be displayed if the table is sorted in descending order.
3. To search for a contact by name or ID, enter search text into the **Name/ID** filter (partial names and IDs can be used in the search).
4. To search for contacts associated with a particular facility, enter search text into the **Primary Facility** filter. You may enter a full or partial Facility ID or use the lookup to select a facility. This filter is only used to search the Primary Facility field, other affiliations are not considered.
5. Check **Hide Inactive** to search for contacts who are designated as active; uncheck this box to search for contacts regardless of their status.
6. Check **Physicians Only** to search for contacts who are designated as Medical Practitioners.
7. Click **Apply**.
8. To view or modify the Contact's data, click the associated **ID** or **edit** link (these links will only be available if you have the *contact_edit* system permission).
9. To send an email message to the Contact, click the **email** link in the **Action** column (this link will only be available if an email address is defined for the Contact).

The T (Type) column identifies contacts designated as Medical Practitioners:

Medical Practitioner

The S column displays the Status of each contact:

Active

Inactive (inactive contacts are displayed if **Hide Inactive** is unchecked)

Using the Medical Practitioner Lookup

Contacts are typically added or modified by using the Contact Manager (accessed from the **View** > **Contacts** menu). Physicians can also be added or modified by using the Medical Practitioner Lookup during editing tasks. This lookup enables data editors to specify a physician or surgeon in record and patient set data fields.

If your account has the *contact_add* permission, the Medical Practitioner popup will include an Add button. Users with the *contact_edit* permission can click the **edit** link adjacent to an existing contact to make modifications. The popup window is not large enough to display all of the fields related to a contact, therefore a limited number of fields can be entered or modified using the lookup. The following fields cannot be modified when using the Medical Practitioner popup: title, suffix, web address, preferred contact method, preferred contact time, and specialties. To view or modify these fields, update the contact using the Contact Manager.

Adding or Modifying a Contact

Requires system permission: *contact_add* is required to create a new contact; *contact_edit* is required to modify an existing contact.

*To add a SEER*DMS contact:*

1. Select **View** > **Contacts**.
2. To create a new contact, click **Add** (this button will only be shown if you have the *contact_add* permission). To modify an existing contact, find and open the Contact for editing:
    a. To search for a contact by name or ID, enter a full or partial name or ID in the **Name/ID** search box.
    b. To search for a contact associated with a particular facility, enter search text into the **Primary Facility** box. You may enter a full or partial Facility ID or use the lookup to select a facility. This filter is only used to search for contacts based on their Primary Facility, other affiliations are not considered.
    c. Check **Hide Inactive** to search for an active contact; uncheck this box to search for a contact regardless of status.
    d. Check **Physicians Only** to search for a contact designated as a Medical Practitioner.
    e. Click **Apply**.
    f. Click the **ID** or the **edit** link associated with the contact (these links will only be available if you have the *contact_edit* system permission).
3. Enter information into the fields identifying the contact (**Title**, **First Name**, **Middle Name**, **Last Name**, **Suffix**, and **Position**). First Name and Last Name are required.
4. You may enter a **Web Address** and **Comments** regarding the contact, if desired.
5. **E-mail**, **Phone**, **Fax**, and postal address fields are used for SEER*DMS communications throughout the system, e.g., to send a follow-back query. Enter information for each communication method that you wish to allow for this contact. For example, if you wish to allow SEER*DMS users to send queries to this contact via e-mail then you must specify an e-mail address. SEER*DMS does not provide a method for encrypting e-mail messages, therefore communications that involve confidential data cannot be sent via e-mail. If this contact is to receive confidential information, you must specify a mailing address, fax number, or phone number.
6. If known, set the appropriate value for **Pref. Contact Method**. You are required to provide the corresponding information for the selected method, e.g., if e-mail is the preferred method of contact then a valid e-mail address must be provided. The preferred method of contact will be used as the default in SEER*DMS communications to this individual. (The user initiating the communication will be able to select an alternate

method, if desired.) If “Do Not Contact” or “Office Visit Only” is the preferred method of contact and a user attempts to send a communication to this contact, SEER*DMS will display a warning message.

7. If the contact prefers to be contacted at a certain time of day, set it in **Pref. Contact Time**. SEER*DMS will display this information on the communication page, if Phone is selected as the method of contact for the communication.

8. If the contact is an abstractor, check the **Abstractor** box. This field is used in lookups that provide a list of the abstractors and system reports that monitor abstractor activity.

9. Verify that the **Active** box is checked (default setting).

10. If this contact is a physician, click **Add** next to the **Medical Practitioner Designation** section title. This designates the contact as a medical practitioner regardless of whether you provide professional credentials and specialties. Once a contact is saved as a medical practitioner, the designation can never be changed. Contacts with this designation are available in the “Medical Practitioners” lookup that is used to select a physician while editing a record or patient set. *Note: you must designate the contact as a Medical Practitioner in order to enter the contact in a physician or surgeon data field.*

11. To define professional credentials and specialties for a medical practitioner:

    a. Enter **Physician License** and **Academic Degrees**, if known.

    b. Click the **Add** link next to the **Specialties** box to specify a practitioner's area of expertise. The following techniques can be used to add specialties:

       i. Double-click a single specialty in the **Available Data Items** box.

       ii. Select one or more of the **Available Data Items** and click -->> .

       iii. Click **OK** to close the **Specialties** box.

    c. To remove specialties from a medical practitioner, select one or more of the items listed in the **Specialties** box and click the **Remove** link.

12. To define affiliations for the contact:

    a. Click **Add** in the **Organization and Facility Affiliations** section.

    b. Click the **Add** link next to the **Org/Fac** box on the left.

    c. Use the Filter to search or limit the list:

       i. To limit the search to active facilities, check **Hide Inactive**.

       ii. To search by facility name or ID, enter a full or partial name or ID in the **Search Terms** box.

       iii. Click **Apply**.

    d. Click an **ID** to select a facility.

    e. Repeat steps b through d for each of this contact’s affiliations.

    f. The **Primary Affiliation** will default to the first organization that you added. Use the drop-down list box to change the value as necessary.

    g. To remove specific affiliations, select one or more of the items listed in the **Selected Org/Fax** box and click the **Remove** link.

h. To remove all affiliations, click the **Remove** link next to the **Organization and Facility Affiliations** section title.

13. Click **Save** to save all changes and exit the Contact page.

Deactivating or Reactivating a Contact

Requires system permission: *contact_edit*

You should deactivate contacts who retired or are no longer a contact for your registry. SEER*DMS will not allow communications to inactive Organization Representatives. SEER*DMS does not prevent you from entering an inactive Medical Practitioner in a data field. If the status of the contact changes or the contact was inadvertently deactivated, you may reactivate the contact at any time. Contact’s are permanently maintained in SEER*DMS for tracking purposes.

To change a contact’s status:

1. Select **View** > **Contacts**.
2. Use the **Filter** to search for the contact:
    a. To search for a contact by name or ID, enter a full or partial name or ID in the **Name/ID** search box.
    b. To search for a contact associated with a particular facility, enter search text into the **Primary Facility** box. You may enter a full or partial Facility ID or use the lookup to select a facility. This filter is only used to search for contacts based on their Primary Facility, other affiliations are not considered.
    c. Check **Hide Inactive** to search for an active contact; uncheck this box to search for a contact regardless of status.
    d. Check **Physicians Only** to search for a contact designated as a Medical Practitioner.
    e. Click **Apply**.
3. Click the **ID** of the contact you wish to deactivate. Alternatively, you may click the **edit** link in the **Action** column to open the Contact editor.
4. Uncheck or check the **Active** box to change the contact’s status.
5. Click **Save**.

Deleting a Contact

Requires system permission: *contact_delete* (future)

Contacts cannot be deleted in the current version of SEER*DMS. The *contact_delete* system permission was created to allow for this functionality in future versions.